

INFORMATION TECHNOLOGY SERVICES PROGRAM
(ITSP)

ITSP Ordering Guide and
Related Information for
both ESC Users and
Prospective BPA Support
Contractors (Under
GSA/FSS Contracts)

18 FEB 2000

Administering Office: ESC/XPX

INFORMATION TECHNOLOGY SERVICES PROGRAM ORDERING GUIDE:

Service CLIN contract structure will be used for orders

CLINs will be associated with their respective "color of money" fund cites (segregate R&D, Proc., O&M, FMS, etc.)

CLIN "Info-SubCLINs" will be used to correspond with each Acrn identified for each Section G fund citation

- R&D funds use Acrn "A" series (AA...AZ, A1-A9)
- Proc. funds use Acrn "B" series (BA...BZ, B1-B9)
- O&M funds use Acrn "C" series (CA...CZ, C1-C9)
- FMS/NATO funds use Acrn "D" series (DA...DZ, D1-D9)

Task Order CLIN ("series") Structure by Fund Type:

(applicable for both LH & FFP orders)

R&D Funds:

CLIN 0001 ITSP Labor (R&D funds)
CLIN 0002 ITSP Data (R&D funds)
CLIN 0003 ITSP Travel (R&D funds)
CLIN 0004 ITSP Material (R&D funds)
CLIN 0005 ITSP Other Direct Costs (ODCs) (R&D funds)
CLIN 0006 ITSP Equipment Lease/Rental (R&D funds)
CLIN 0007 Reserved
CLIN 0008 Reserved
CLIN 0009 Reserved
CLIN 0010 Reserved

Procurements Funds:

CLIN 0011 ITSP Labor (Proc. funds)
CLIN 0012 ITSP Data (Proc. funds)
CLIN 0013 ITSP Travel (Proc. funds)
CLIN 0014 ITSP Material (Proc. funds)
CLIN 0015 ITSP Other Direct Costs (ODCs) (Proc. funds)
CLIN 0016 ITSP Equipment Lease/Rental (Proc. funds)
CLIN 0017 Reserved
CLIN 0018 Reserved

CLIN 0019 Reserved
CLIN 0020 Reserved

O&M Funds:

CLIN 0021 ITSP Labor (O&M funds)
CLIN 0022 ITSP Data (O&M funds)
CLIN 0023 ITSP Travel (O&M funds)
CLIN 0024 ITSP Material (O&M funds)
CLIN 0025 ITSP Other Direct Costs (ODCs) (O&M funds)
CLIN 0026 ITSP Equipment Lease/Rental (O&M funds)
CLIN 0027 Reserved
CLIN 0028 Reserved
CLIN 0029 Reserved
CLIN 0030 Reserved

FMS/NATO Funds:

CLIN 0031 ITSP Labor (FMS/NATO funds)
CLIN 0032 ITSP Data (FMS/NATO funds)
CLIN 0033 ITSP Travel (FMS/NATO funds)
CLIN 0034 ITSP Material (FMS/NATO funds)
CLIN 0035 ITSP Other Direct Costs(ODCs)(FMS/NATO funds)
CLIN 0036 ITSP Equipment Lease/Rental (FMS/NATO funds)
CLIN 0037 Reserved
CLIN 0038 Reserved
CLIN 0039 Reserved
CLIN 0040 Reserved

WORKING CAPITAL FUNDS: (MSG and others as applicable)

Either use the same CLIN structure as above (with the series running from 0041 through 0050), **OR** determine whether such funds are one, two, or three year funds and associate with the appropriate series: O&M (one year), R&D (two years) or Procurement (three years)

Orders may be "fully funded" or "incrementally funded".

Order Cover Page (DD Form 1155 or acceptable format):

Block #1 will contain the awardee's GSA Schedule No. (e.g. GS-36F-5010G). Block #2 will contain Order No. (e.g. F19628-99-F-8XYZ). **We are using the "8000 series" for orders placed against BPAs under the GSA FSS in order to track data under the DD Form 350 inputs.** In addition, with regard to the DD350, if code B13A="6", then "D1" (Type of Business) must also be filled in; if B13A="6", then fill in "D6" (Women-Owned Business) too.

Block #3: effective date (or Mailing Date) of the order

Block #16: after "REFERENCE YOUR" text, "asterisk" the awardee's BPA No. (e.g. F19628-99-A-0001) in that line. **Order Numbers from the "8000 series" will be assigned by "CONDAPS"** (the same source which issues new contract numbers) **or via "manual logs" at GSUs without CONDAPS.** Anytime a user requests a "PIIN" for an "F" action (in our case, an ITSP BPA order number), the user will be asked whether it is a BPA (GSA/FSS) action (vice a direct order against a GSA Schedule, for example), and if so, assigns the next available "PIIN" in the F-"8000 series". For purposes of ITSP "F" type actions only, the 8000-8999 range will be reserved in the following manner (subject to later revision, if necessary):

F-8000 through F-8499: for use by ESC at Hanscom AFB

F-8500 through F-8599: for use by CPSG/PK at Kelly AFB

F-8600 through F-8999: Reserved (TBD)

(MSG and SSG will reserve their own "8000 series" numbers for their distinct buying office code, as will the 38th EIW. MSG has identified their code as being "FA8770"; vice ESC-HAFB code of "F19628".)

Period of Performance of initial orders awarded as "Labor Hour" type (with cost reimbursable "support" CLINs) cannot exceed a basic period of performance of 12 months. "Firm Fixed Price" type orders can have a longer period of performance if dictated by the length

of the "task completion" requirement (but not to exceed the period end date of the "sponsoring" BPA).

Requirements for continued support can be obtained by either modifying* the incumbent's order with additional taskings, obligations, and an extended period of performance (via "Option Exercise" if provided for within the order), or a new "BPA solicitation and downselect" process can take place for ordering the "new" requirements for the additional period identified.

***You can modify an existent order for additional or continuing support, rather than "re-compete" (through the BPA "downselect" process) for that additional support, if your original order's RFQ had requested the contractor to also propose support for one or more option years (but not to extend beyond 31 Mar 02). Such option years would also have to be "pre-priced" for purposes of future exercise considerations.**

If options are to be considered for the possible extension of "incumbent" support beyond the basic period of performance identified in the order, your order has to also include a date (prior to basic award end date) by which the option has to be exercised. In addition, although you would have evaluated the option period(s) as part of the "best value" decision for the initial order, you are required to present a Business Case Analysis (BCA) to ESC/CD (via ESC/XPK) to justify the proposed option exercise, vice competing for such follow-on requirements. The GSUs shall implement the same BCA process at their locations to "mirror" those in place at HQ, ESC. In addition to the required areas to address within the BCA documentation, ensure that there is a continuing requirement, that funds are available, that past performance has been satisfactory, and that prices proposed for the option period are fair and reasonable, before proposing an "option exercise".

Should your ITSP order not contain options for (exercising) continued performance, you will have to conduct a new solicitation & "downselect" procedure for award of follow-on support no later than the end date of your current order. **For "follow-on" orders, the evaluation criteria for picking the best source SHOULD INCLUDE the costs and schedule implications of disruption should there be a break in continuity of support.** Where warranted, those criteria may also further substantiate a decision to keep the incumbent team in place, should that result be your best value decision.

Order Attachment pages will include (as a minimum) CDRL requirements, any applicable DD Form 254, awardee's proposal or proposed SOW incorporated (to include labor category and estimated cost or price breakouts, etc.)

Decentralized Ordering is authorized for ESC (ITSP-user) programs IAW Air Force FAR SUP 5316.505-90. ESC/XPK administers the ITSP program centrally, but authorizes its individual users to prepare orders "locally" for "central" ITSP PCO execution. For example, ESC-Hanscom user offices complete their solicitation, evaluation, & selection process and then prepare an order/orders for award. They are forwarded to ESC/XPK's ITSP Contracting Officer for review and signature. The order is then returned to the user for award distribution. Each GSU will follow the same procedure by establishing its own "clone" of ESC/XPK, or simply identify one internal contracting office to process and award all of their user ITSP orders. **IT IS IMPERATIVE THAT ESC/XPK BE A DISTRIBUTION RECIPIENT FOR EACH ITSP ORDER/MODIFICATION SUPPORTING ANY CENTER USER** so that the data will be available for centralized management and administration purposes.

Decentralized ordering (with centralized execution) is authorized at all ESC-Hanscom PK-SPO/PAD support offices, as well as at the GSU contracting offices (MSG/PK; SSG/PK; CPSG/PK; 38LS/LGC Contracting Flight). Ordering offices shall adhere to the terms & conditions of the BPA as well as those of the controlling GSA/FSS

Schedule contract, and prevent or identify any abuses, such as issuance of orders for services that are not within the scope of the ITSP program. Ordering offices shall follow the ITSP program policies & procedures for solicitation, evaluation, selection, and award of orders, to include procedures promulgated by 01 May 98 SAF/AQC contracting policy memo 98-C-07 on the Use of Blanket Purchase Agreements (BPAs) With Federal Supply Schedules (FSS). Contracting Officers initiating orders on behalf of their SPO/PAD "user" shall also ensure that **Functional Area Evaluator (FAE)** oversight of contractor performance is maintained, and semi-annual/**quarterly program-support evaluation reviews** are conducted with your ITSP BPA contractor/team.

ORDERING GUIDANCE:

ITSP ordering procedures are taken from aspects of the GSA FSS "ordering procedures for services"; SAF/AQC contracting policy memo 98-C-07 (98 May 01) entitled "Use of Blanket Purchase Agreements (BPAs) with Federal Supply Schedules (FSS)"; as well as ESC policy addendum (before ordering any A&AS services, ensure that an approved Determination & Decision Document (DDD) exists justifying the need to procure contracted support because of the unavailability of organic resources to address the mission requirements). The ITSP Program **does have** an approved "Class DDD" to cover its requirements through 31 Mar 02.

ORDERING PROCEDURES for ITSP SERVICES:

FAR 8.402 addresses procedures for ordering services priced on GSA schedules at (loaded) hourly rates. These special ordering procedures take precedence over those "standard" procedures in FAR 8.404.

When ordering services, ordering offices shall:

- I. Prepare a Request for Quotes (RFQ)

a. a SOO (Statement of Objectives) or PWS (Performance Work Statement) - that outlines, at a minimum, the work to be performed, location of work, period of performance, deliverables, applicable standards, acceptance criteria, and any special requirements (i.e. security clearances, travel, special knowledge, etc.) should be prepared. A SOO Preparation Guide is available within ESC as a "tool" also.

b. the "request" should indicate whether the offeror should submit a proposal for a "Labor Hour" order structure, or a "Firm Fixed Price" order structure. A fixed price order should be requested only if the ordering office determines that it is possible at the time of placing the order to estimate accurately the extent and/or duration of the work, and to anticipate cost with any reasonable degree of confidence. When that's not possible, a labor hour quote will be requested. The user's RFQ should also specify whether support is to be collocated in Govt facilities, or not, **and if so, whether the Program Office will provide ADPE for support contractor personnel to use as part of the basic collocated "Base Support" of a phone, a desk, & a chair.** This information will allow the BPA offeror to determine whether to bid its "on-site" rates or its "off-site" rates, as contained in its BPA (or proposal-specific discounted rates). Where users opt not to provide such ADPE as Base Support, Program Offices will normally be better served NOT to contract for support where the contractor requests reimbursement to cover the cost of "outfitting" their personnel with ADPE for use within Govt. work space areas, because the users will eventually have to assume ownership of such ADPE as Government Property (paid for under certain expenditure payments under the order's invoicing procedures). This is not the proper procedure for user acquisition of ADPE. Offeror proposals shall be based on the hourly (loaded) rates in the schedule contract (or any discounted rates being provided by the offeror for the particular "user requirement" being bid) and shall consider the mix of labor categories and level of

effort required to perform the services described in the offeror's statement of work (SOW). The proposal shall also include any other estimated incidental costs related to performance of the services ordered (e.g. reimbursement of travel costs at the rates provided in the Joint Travel Regulations (JTR)). A ceiling price (both in manhours and dollars) must be established for labor hour and fixed price orders.

c. the "request" may also solicit from the offerors information on their experience and/or past performance with respect to similar tasking scope. The "request" shall also notify the offerors as to what basis (**evaluation criteria**) will be used for selecting the BPA Team(s) to receive the order. Thus, Best Value selection criteria, including the intended use of past performance factors, shall be included in the request.

- **Examples of Evaluation Criteria** (not all-inclusive):

- technical/management approach and/or capabilities
- innovativeness of "requirements solution" proposal
- support transition plan ("old" to "on-going" support)
- cost/price considerations (to include rate discounts)
- past performance/experience in certain functional or specialized areas.
- ability of offeror (if requested in RFQ) to propose a "requirements solution" in a way which would allow the user the option of making multiple "direct order awards" (to "Lead/Prime" and/or BPA teammates) in order that "socio-economic" (small-business community) goals can be further realized through direct obligation of funds to awardee(s).
- ability of offeror (if requested in RFQ) to propose a "requirements solution" against identified (separate

& distinct) subsets of the overall requirement, so that the user has the option of making one or more order awards to one or more BPA offerors.

-- others to be tailored according to the specific or unique needs of the user.

d. If a solicitation is requesting offeror pricing of "option year" requirements support solutions, then the following FAR Provision, 52.217-5 (Evaluation of Options), shall be included in the RFQ.

e. As part of the BPA offeror's proposal, users may request resumes of offeror personnel in applicable functional areas to provide insight into the qualifications for performance of proposed support. Such resumes should be "sanitized" (nameless) so that qualifications are evaluated rather than "individuals", as we are acquiring "non-personal" services.

II. Once the above "requirements package" is complete, ESC-Hanscom location users forward same to ESC/XPK for review (support scope, etc.) **The package will include (as a minimum) the SOO, evaluation criteria, and the specific BPA Teams to be solicited by the user.** GSU users forward same to their locally designated ESC/XPK office. **For requirements to be satisfied under the Specialized Cost Services (SCS) BPAs under ITSP**, an interim step is required before the ESC/XPK review takes place. **The requirements package will pass through ESC/FMC for their review first.** Once a satisfactory review is accomplished, a control number will be issued by the reviewing office for the user's requirement so that the process can be "monitored" until selection and order award take place. Examples of control numbers are as follows:

Hanscom:	00-HAN-AC-0001	CPSG:	00-CPG-XY-0001
MSG:	00-MSG-YZ-0001	SSG:	00-SSG-YX-0001
38 th EIW:	00-38E-ZY-0001		

00 = FY of requirement
HAN(etc.) = ESC geographic location
AC(etc.) = user/program office(2-4 alphanumeric digits)
0001 = control number awarded sequentially to user

III. Electronically transmit a "Request for Quotes" to no fewer than **three (3)** BPA Team offerors for **requirements estimated at \$500K or less;** or at least **four (4)** BPA holders **if in excess of \$500K** (unless you've secured an approved J&A for selection of a sole source services provider). This step occurs after "users" have conducted their "market research" via analysis of BPA holder web sites (containing "team makeup, scope of services offered, labor rates, experience/past performance insight, and other factors)and/or "capabilities discussions" with business representatives of BPA holders, to determine a group (no fewer than 3) of BPA (holder) Teams who appear to offer the best prospective value for fulfilling their requirement. When "soliciting", ordering offices should explore pursuing prices below those that are already on the BPA holder's GSA schedule, or BPA itself. Ordering offices should strive to minimize the BPA teams costs associated with responding to requests for quotes for specific orders. Requests should be tailored to the minimum level necessary for adequate "best value" evaluation and selection for order placement. Oral presentations can supplement a written proposal if so requested by the "user".

IV. Evaluation and Selection

In performing evaluations, review all factors (price & non-price, which includes past performance) in making an award. Organizations shall consider small business participation as a factor in the best value selection for an order. If necessary (in order to ensure that you can make your "best value" decision), discussions with offerors can take place in order to clarify aspects of a proposal that may be vague/ambiguous, and proposal "changes pages" may be submitted by an offeror if the outcome of the clarification discussions

warrants an update to the proposal submitted. After responses have been evaluated against the factors (evaluation criteria) identified in the "request", the order shall be placed with the BPA holder (Team) that presents the best value (based upon an integrated assessment of technical and management capabilities, cost/price, past performance, socio-economic award goal attainment, etc.) to meet the Government's needs.* The ordering decision should be documented and be consistent with the established evaluation process. A memorandum containing the user's rationale for selection shall accompany the documentation leading to award of an order.

* if all proposal submittals are deemed "too costly" by the user, you have the option of informing the offerors that the requirements solutions are "unreasonable" and revising the scope of your requirements objectives ("downscope") in the hope of receiving revised proposals from which award & ordering can be achieved.

Socio-economic obligation goals under ITSP:

As a Product Center, ESC-wide **order obligations** under the ITSP support services program have to accumulate, as a minimum, to an amount of **at least 25% direct award obligations to the Small Business community**. Of that 25% threshold, there's a **5% subset goal for Small & Disadvantaged Businesses (SDBs)**, and a **5% subset goal for Small Woman-Owned Businesses**. Basic Small Business obligations would therefore need to be 15% or higher for overall small business community goal attainment. **Each 2-Ltr "user" is responsible for achieving or exceeding the above goals individually in order to ensure Center-wide success** (unless relief is granted by ESC/XP based upon "mission essential" rationale).

V. Order Preparation and Award

Once the selection process and award rationale documentation memo is complete, user PK-support offices can begin "writing" the order(s) for award*, using the

CLIN structure and format prescribed herein and as required by the Air Force. The proposed order file(s) will then be submitted to your respective ESC/XPK-type office (depending on geographic location) for review of evaluation/selection/award rationale, accuracy of order content, and "central" ITSP Contracting Officer signature. Signed orders will be returned to the respective user's PK-support group for initiation of the distribution process for formal award. **ESC/XPK must also be a recipient of every order/modification distributed under the ITSP program.**

* Depending on previously stated user requirements and evaluation criteria for your support procurement, users have ordering options to include placing one (1) order strictly with the BPA "Lead/Prime" contractor, one or more orders with "Teammates" designated by the "Lead" in its proposal, or multiple orders to include the "Lead" and other "Teammates" proposed for direct awards (since they have their own GSA Schedule contracts) as identified in the BPA Team proposal. Direct ordering from teammates might be an option for several reasons, most likely of which would be to secure credit toward socio-economic obligation goal attainment when such a "Teammate" is a small business, a small & disadvantaged business, and/or a small woman owned business. "Subcontractors" (those companies on a BPA Team but without their own GSA Schedule contract) can not receive direct orders but rather must be part of the support to be provided through a direct order award to the "Lead/Prime", and at the Lead/Prime labor rates.

Effective Date of the Order: may be the "Mailing Date", a future specified (prospective) start date, or a retroactive start date only if two (2) actions have both already been accomplished:

- the selection decision for award has already been completed (to include) the written rationale for same;
- the ordering Contracting Officer has initiated a letter authorizing the awardee(s) to proceed at risk (if they so agree) pending the formal issuance of the order and its obligated funding.

IMPORTANT: During the transition from your current ITSP or other SETA contract support services to a "new" ITSP support team, you don't have to wait and award coincidental with the performance end date of your current services contract, or ITSP, order(s). It will be somewhat easier to implement transition from "current support" to "new" ITSP support if there is some form of "incremental" ordering over a period of time taking place (i.e. if most of the Center has support coverage through 31 Mar 00, we don't want everyone to wait until the last half of March to complete their ITSP selection process and submit their task order(s) for review and award). Complete & award **prospectively**, if possible; **then plan your transition.**